QUALITY ASSURANCE PUBLICATION GUIDELINES 2004 Utah State Office of Education 250 East 500 South P.O. Box 144200 Salt Lake City, UT 84114-4200 Patti Harrington, Ed.D. State Superintendent of Public Instruction

QUALITY ASSURANCE PUBLICATION GUIDELINES

For

The Utah State Board of Education
The Utah State Office of Education
and
The Utah State Office of Rehabilitation



Utah State Office of Education 250 East 500 South P.O. Box 144200 Salt Lake City, UT 84114-4200

Patti Harrington, Ed.D. State Superintendent of Public Instruction

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> > 2004

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FOREWORD

This publication has been prepared as a guide to aid staff members in the preparation of high quality documents for publication. It is also intended to serve as an example of proper style and formatting, as well as the correct order of such front-matter pages (title page, State Board page, foreword, preface, etc.) as may be required for certain documents. All staff members, as well as personnel under contract with this agency, will use this manual (in conjunction with *The Gregg Reference Manual, Tenth Edition*) as a style and format guide.

All procedures in the Quality Assurance Process outlined in this manual need to be implemented. This will assure that our agency is represented by professional quality documents.

Patti Harrington, Ed.D State Superintendent of Public Instruction

PREFACE

This manual was prepared to explain the format and style to which USOE/ USOR documents must conform, to define the steps and rationale of the Quality Assurance Process, and to clarify other current issues related to the publishing of documents. Publication developers are urged to set adequate timetables to accommodate the procedure. As technology continues to evolve, these guidelines will be modified as needed.

The preparation, publication, and distribution of printed materials are important functions and responsibilities of our agencies. All professional staff members are encouraged to provide leadership in the development of printed materials and support for uncompromising excellence in the publications produced under their supervision. Thank you for the commitment you are making to the Quality Assurance Process.

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INTRODUCTION

The purpose of this publication policy, procedure, and style manual is assure a high standard in the quality of the publications prepared for release by any of the offices of the State Superintendent of Public Instruction. It is intended to promote a more professional quality in overall appearance and a consistency in the format of the introductory pages. In addition, it establishes, as policy, a procedure for obtaining prior approval for preparing manuscripts for publication. The procedure, among other things, requires the chief author to explain the document's purpose, identify the intended audience, and estimate the number of pages and the number of copies to be printed.

This document is an example of how a major publication for the Utah State Office of Education should be organized. It is also an example of the style that should be used; however, creativity and individuality are welcomed.

This manual, along with other information about the Quality Assurance Process, is available in electronic form on the USOE's Quality Assurance website at http://www.usoe.k12.ut.us/PR/QA/home.htm.

Chapter 1

AGENCY RESPONSIBILITY FOR PUBLICATIONS AND THE QUALITY ASSURANCE PROCESS

Agency Publications

Agency publications should display a professional quality in terms of physical appearance, style, and content. The appearance of agency publications is as important as any other single factor in projecting an image of professionalism to educators and the general public. All communications should adhere to the style guidelines set forth in this publication.

Staff Responsibility

The preparation, publication, and distribution of printed materials is regarded as a major agency function and responsibility. Each program specialist or supervisor is encouraged to provide creative leadership for his/her particular area of responsibility through the use of printed materials. Because this function demands a large commitment in terms of staff time, printing and binding costs, and distribution expenses, appropriate leadership (clearance and approval) must be given prior to the preparation of the materials to be printed.

General Principles

The Quality Assurance Process was established to improve the quality of all Utah State Board of Education (USBE), Utah State Office of Education (USOE), and Utah State Office of Rehabilitation (USOR) publications by assuring that they conform to high expectations of uniformity, originality, correctness, and cost-effectiveness. The quality of the finished product is the overriding consideration in the preparation of documents for publication.

Uniformity means that all major documents must comply with the format specified in this guide and display the mandatory preliminary pages that contain certain required information.

Originality means avoiding the duplication of extensive data that is available from another source, and encouraging the creativity that is appropriate in both the thought and visual aspects of the document.

Correctness means error-free grammar, spelling, punctuation, and sentence structure, and the expression of coherent facts and ideas that are accurate and easy to understand.

Cost-effectiveness means being productive by achieving the greatest quality for the most economical cost. The cost incurred to reprint a publication with errors will be charged to the budget of the originating section.

Adherence to these general principles assures that all documents produced will be recognizable as official publications of the Utah State Board of Education, the Utah State Office of Education, or the Utah State Office of Rehabilitation, and also assures that we can take pride in the finished product.

The Procedure

All documents intended for dissemination outside the USOE or USOR must follow the Quality Assurance Process. This includes printed materials such as reports, program guides and evaluations, handbooks, curriculum standards, manuals, directories, survey findings, certificates, posters, flyers, perspectives, initiatives, strategic and master plans, booklets, brochures, forms, agency letterhead, calendars, newsletters, and all other printed materials. All such items that are produced with public funds and/or include the names or logos of the Utah State Office of Education, the Utah State Office of Rehabilitation, or the Utah State Board of Education are subject to this process.

Exceptions include:

- Correspondence such as memoranda, faxes, and letters.
- Certain interagency reports of a legal or technical nature.
- Grant proposals and announcements.
- Materials prepared specifically for in-house presentations or workshops.
- Versions of publications clearly labeled "DRAFT" on the front cover.
- Working documents such as meeting minutes used by committees and task forces.
- Reprints of documents produced by other entities that cannot be altered by the USOE or USOR (e.g., laws).

Which Logo to Use

The vast majority of the documents that follow the Quality Assurance Process will be Utah State Office of Education or Utah State Office of Rehabilitation publications and should bear either the USOE or USOR logo. These are the many and varied printed reports, manuals, and other documents that are customarily distributed to local school districts and schools, as well as to college and university teacher education departments and cooperating agencies or organizations.

Utah State Board of Education publications are those officially presented to the Board for input, modification, and formal approval, and are often distributed to the Governor's Office and to national and state education agencies and organizations. Only these are to bear the USBE logo.

PUBLICATION PROCEDURE

Approval to Publish

A new Quality Assurance Form must be completed by the person who is primarily responsible for the document. Copies of this form are readily available from the Public Relations Department and the USOE Graphics room. Clearance for the publication must be obtained from various personnel at certain steps in the Quality Assurance Process. (See the copy of the Quality Assurance Form on page 5.)

Preparation of Manuscript

The quality of the finished product is the overriding consideration in the preparation and editing of a manuscript. The distribution of a few high quality publications that are complete, accurate, and professional in appearance is preferable to the production of a larger quantity of second-rate, lower quality publications.

COPY ACCURACY

The section coordinator who signs a clearance for publication is authorizing the expenditure of public funds and has a responsibility that should be taken seriously. He/she is responsible for the accuracy of all documents covered by the Quality Assurance Form.

LAYOUT PREPARATION

Layout preparation for all publications is the function of the office initiating the request. That office should prepare the materials in harmony with the agency style pages illustrated in this guide. For any major publication, layout preparation, font selection, headlines, art, and colors to be used will be decided cooperatively by the originator and staff members from Graphics and Printing.

Special requirements beyond the processing capabilities of the Printing Section should be identified, and a plan for their preparation developed for approval by the division administrator.

Editing and Proofreading

The manuscript must be spell-checked and proofread/edited by some person or group other than the originator or typist before it is sent through the Quality Assurance Process. The originator or a competent proofreader assigned by him/her should make a further evaluation and check of the finished, print-ready master copy before it is submitted to the Quality Assurance Process. The manuscript may be revised and sharpened by these proofreader(s) and/or editor(s) to facilitate clarity. Avoid or correct the following things: run-on sentences, an overly academic style, the use of jargon, and unexplained or unfamiliar words and expressions.

Completion of the Quality Assurance Form Checklist

Upon completion of the initial editing, evaluation, and proofreading, the master copy/final draft must be submitted for signatures through the Quality Assurance Process. The Quality Assurance Form will serve as a cover sheet for Printing and will show by inclusion of the signatures the status of the manuscript and adherence to the style outlined in this manual.

The division/section coordinator will ensure that materials being submitted for printing have been checked thoroughly before submitting them to the deputy/associate superintendent or the USOR Director. The coordinator will certify the fulfillment of the checklist requirements and request for publication approval by signing the completed form before it is sent to the division administrator and the deputy/associate superintendent for approval. Approval signifies that the attached document has been determined to be a necessary publication of the agency and that the administrator gives approval for the expenditure of funds for its production.

Follow Through

The originator of the manuscript should work directly with the Printing Section or a commercial jobber to communicate special production needs and to assure completion by the date needed.

Lead Time for Completion of the Quality Assurance Process

Advance preparation in scheduling a job for publication is of the utmost importance. Too often, the originator delays final preparation of the master copy until only a short time before finished copies are needed for distribution.

Because of the large number of publications that are always in process, staff members are cautioned to have the completed, print-ready copy of larger publications in the Quality Assurance Process at least one month prior to any distribution deadline. During the winter months and just prior to the opening of school, as much as six to eight weeks of lead time may be needed because of the great demand for editing and printing services.

Division Priorities and Scheduling Time

To avoid undue bottlenecks within the production schedule, and to coordinate with the demands on the Printing Section, each division should plan for and schedule its publication program carefully. This includes a determination of the need for developing, revising, or reprinting publications and the determination of priorities. It may be wise for each division to develop a priority list for all publications and schedule sufficient lead time for production. Scheduling is very important.

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Steps in the Quality Assurance Process

Step 1: Approval of Originating Section Coordinator

Approval of the originating section coordinator is important before the procedure begins to assure that the publication of the document is valid and appropriate for the needs of the USOE or the USOR and of its intended audience. The originator, who is responsible for moving the publication through the entire Quality Assurance Process, must indicate on the QA Form the date the publication is needed to provide for adequate processing time.

Step 2: Strategic Planning Services Coordinator Approval and Initial Review

The draft of the document is first examined to identify any problems that need to be resolved. In some cases, this may involve a major change in the structure or content of the publication, including additions or deletions.

Step 3: Initial Proofreading/Editing and References Check

The document (with its Quality Assurance Form) is submitted to the publications editor in the Public Relations Section for initial proofreading and editorial corrections. *The Gregg Reference Manual, Tenth Edition,* is used as the official guide for proofreading and editing to ensure uniformity of style, grammar, punctuation, capitalization, etc., in the draft document. An up-to-date collegiate/university dictionary (*Webster's Third New International Dictionary of the English Language Unabridged*) and the Gregg manual are available in the USOE Graphics room. Bibliographic references are examined for content and consistency of format.

Following the original proofreading/editing (and bibliographical reference check, when necessary), the draft is returned to the originator for correction and consultation, if needed. For the second proofreading, please return the old, marked-up draft copy showing the publication editor=s corrections/changes that were to be made. Comparing the two documents will facilitate the final proofreading and expedite returning the document to the originator so it can be printed more quickly.

After corrections have been made, the publications editor reviews the material and forwards it to Step 4 (if graphics assistance is needed).

Step 4: Design/Layout

Graphics assistance in designing the final document cover is available to make the publication camera-ready. No specific graphical format is designated as the standard for publication, nor is graphics assistance mandatory. The Graphics staff is not responsible for text; rather, the originator is expected to provide a complete and correct version on a computer diskette or by e-mailing the text.

Step 5: Final Proofreading

The final copy is proofread once more in order to check for any additional errors that may have crept into the document during the design/layout step of the process.

If no further changes are required, the publication is ready for printing and is returned to the originator. The originator is responsible for obtaining the required signatures of the appropriate section coordinator, deputy/associate superintendent, or Utah State Office of Rehabilitation Executive Director before the publication is submitted to Printing.

DEFINITION OF TYPES OF PUBLICATIONS

Various types of printed materials are developed by the agency. The following definitions are presented to help classify them. Some printed materials may be classified under more than one definition.

Publication

The term "publication" means any material to be used by school districts, educational institutions, organizations, agencies, members of the education profession, or the general public that is produced in multiple copies through the use of agency resources. It does not include materials prepared for use within the agency.

This definition includes various types of non-print materials such as films, filmstrips, slides, recordings, videotapes, transparencies, and similar materials in a broad connotation. The same standards required for publication of printed materials must be met for these types of materials, and administrative approval must be obtained prior to their development and use.

Recurring and Nonrecurring Publications

RECURRING PUBLICATIONS

These publications are issued more or less on a periodic basis; examples include perspectives, annual reports of the State Superintendent of Public Instruction, salary studies, statistical reports, newsletters, regular report forms, curriculum guides, and the annual school directory.

NONRECURRING PUBLICATIONS

Publications in this classification are not issued periodically, even though they may be reissued, revised, or updated from time to time with appropriate administrative approval.

FORMS AND GENERAL ANNOUNCEMENTS

Forms, circular letters, announcements, survey instruments, and other printed materials are considered to be agency publications because they are printed in multiple copies by the agency.

LETTERS AND PHOTOCOPIED MATERIALS

Regular letters and photocopied materials are not considered publications; however, some materials produced for quick reproduction may be considered to be publications if they fall within the definition of agency publications given above.

FORMAT, IDENTIFICATION, AND CREDIT

All department publications shall have a degree of uniformity in format, carry proper and adequate individual and agency identification, and give appropriate credits. High standards must be maintained for all materials distributed under the auspices of the agency. Materials may be disapproved before completion if they do not meet the standards or if mandatory style or format provisions are not met. As noted on the preliminary pages of this publication, the page style and format used in this publication should be followed. Some variation in the placement is acceptable to make the publication more appealing or readable; but unless an exception is granted, publications by definition should include the following parts.

FORMAT STYLE FOR MOST PUBLICATIONS

Cover

The COVER is MANDATORY for most publications. It contains:

- The main title and subtitle (if any) of the document.
- The name and address of the originating agency.

 Example: The Utah State Office of Education, 250 East 500 South, P.O. Box 144200, Salt Lake City, UT 84114-4200.
- The name and title of the current State Superintendent of Public Instruction or Executive Director of the Utah State Office of Rehabilitation (USOR).
- The year of publication. Example: 1995.
- Appropriate artwork and the logo of the USBE, the USOE, or the USOR.
- For larger publications, there may be appropriate identification on the spine showing the title, the originating agency, and the year of publication.

Graphic illustrations and other logos are optional. Some cover designs may require that the agency information and logo be placed on the back cover, but they must be visible on the outside of the document.

Title Page

The title page is MANDATORY for most publications. It must contain:

- The main title and subtitle (if any) of the document.
- The name and address of the originating agency.
- The name and title of the current State Superintendent of Public Instruction or Executive Director of the USOR.
- The division name, name and title of the associate superintendent, the originating division administrator/director/coordinator, and, if desired, the name and title of the author(s) or individual chiefly responsible for the document should also be included. Example:

Strategic Planning Services and Special Projects (Name of Current Associate Superintendent), Associate Superintendent

(Name of Current Coordinator), Coordinator

If the document is the joint effort of two or more agencies, the same information from both must be included. Use of logos on the title page is optional.

Letter of Transmittal

A letter of transmittal may be used to direct the publication to the attention of specific individuals and is OPTIONAL. It may be in the form of a letter when sent outside the agency, or it may be a memo when used for distribution within the agency. It may be clipped to the front of a document, or it may be inserted into the document as the page before the title page.

State Board Page

The State Board page is MANDATORY for most publications. All publications officially presented to and approved by the Utah State Board of Education (including reports required by law) must include a page that contains the name, district number, and address of each current member of the State Board. It must also include the name and title of the Executive Officer and the name and title of the Board secretary.

The Board page is required for official publications of the USOR (which serves under the Board's jurisdiction) as well as for those of the USOE.

The Board page may be included in other major publications of statewide significance to education at the discretion of the originating section coordinator, even though the document may not have been explicitly reviewed by the Board.

The Board page shows:

- The name of the Board.
- The Executive Officer by that title, preceded by his/her name.
- The agency address.
- The name and address of each Board member.
- The Board secretary by name and title.

If the publication is by a committee, a similar page listing members of commissions, committees, or task forces (if any) directly responsible for the document should follow the Board page. It should be in a similar format and indicate:

- The committee name.
- The chairperson's name and committee title, vocational title, and address.
- Each member's name, title, the institution represented (if appropriate), and address.

Foreword

The foreword page is MANDATORY for most publications. It is a brief statement that cites the legal mandate for the document, if any, and defines its primary purpose. It may also include comments that draw attention to its importance in relation to current issues or challenges. It is signed by the State Superintendent of Public Instruction; or, for USOR publications, it is signed by the Executive Director of the State Office of Rehabilitation. Use letter signature format: drop down four lines to allow room for the signature and then type the Superintendent's name and title. Please do not put a line on which you expect a signature.

Preface

The preface page is OPTIONAL. It may be used to provide a full explanation of the purpose and scope of a report that has multiple parts or complicated content. The preface is usually longer than the foreword.

Acknowledgments Page

The acknowledgments page is OPTIONAL. It may be used to acknowledge those persons responsible for writing, compiling, editing, designing, providing graphic art, and preparing the publication for distribution. Its use is left to the discretion of the originating section coordinator or associate superintendent. Individuals, institutions, or agencies that received reimbursement for professional services should not be included among those acknowledged.

Executive Summary

An executive summary may be MANDATORY or OPTIONAL. It is required for major, lengthy publications that are to be included as items on the agenda of the Board. It is not needed for documents that are brief or self-explanatory in nature.

The executive summary is a one- or two-page summary statement of 250 to 500 words communicating the primary message the document as a whole seeks to convey. Whenever possible, the specialist or coordinator most familiar with the content of the document and its significance should prepare the executive summary to provide the desired emphasis. In addition, it may describe highlights, key facts and figures, and the overall impact and implications of the report. It is intended to offer an opportunity to grasp the overall significance of the report in a form that is brief, quickly understood, and more accessible than if the reader were to read the report in its entirety.

Table of Contents

A table of contents is MANDATORY for all publications containing multiple parts. It provides a list of the various components of the document in order to help the reader locate a specific part or section.

The preliminary pages are listed in lower-case Roman numerals. The title page and Board page are counted, but they are not numbered. Thus, the Foreword will be the first preliminary page to have a small Roman numeral printed on it, and the last Roman numeral will be the introduction page. All pages must be counted. Please refer to the front pages of this document for examples. The sections of the report's body/text are listed in Arabic numbers (e.g., 1, 2, 3, and so forth). Odd numbers are always on the right-hand side, and even numbers are on the left-hand side.

List of Tables/Charts/Graphs/Figures

A list of tables, charts, graphs, and/or figures is OPTIONAL. If a few charts and/or tables accompany a document, they may appear in the body of the document close to the text that explains their significance, with no need for a list of charts to assist the reader.

If numerous charts, graphs, or tables are included, a list with page numbers, following the table of contents, may be desirable. In some financial and statistical reports, the table of contents will consist only of the list of charts and graphs.

When a chart used is taken from another source, the original source should be identified for the reader on or near the chart itself.

Introduction

The introduction page is OPTIONAL. It leads the reader into the body/text of the document by "setting the stage" or establishing a point of view for what lies ahead and by placing the topic of the document in a broader perspective or context. It may be considered the first part

of the text, but because it has a Roman numeral page number, it is not included as part of the body of the document.

Body of the Publication

The body/text of the publication should be organized with appropriate headings and subheadings as needed to help the reader comprehend the material in a manner that makes its particular content as clear as possible. If possible, the entire body/text of the document should be prepared using the same font, to enhance the professional appearance of the document.

Adequate margins are also extremely important. Refer to Section 14: Reports and Manuscripts in *The Gregg Reference Manual, Tenth Edition,* for detailed information. Be sure to allow a large enough margin on the left side of the page for the binding. All this should be pleasing to the eye!

For a document that is backed, begin with page number 1 on the right side and number 2 on the back of page number 1. Odd numbers are always on the right-hand side of the document, and even numbers are always on the left-hand side. Use this document as an example.

Selected References and Bibliography

Selected references and bibliography pages are OPTIONAL. However, when information from an outside source is used, a reference must be made citing that source and providing appropriate credit to its originator. A list of these sources is placed at the end of the publication. The typical reference cites several elements of information about the source such as its author, title, and copyright date. Several systems may be used to list these elements, and each system offers dozens of variations to describe different types of sources. Refer to Section 15: Notes and Bibliographies in *The Gregg Reference Manual, Tenth Edition*, for detailed information. Generally, the form of reference for USOE publications should follow the system described in the Gregg manual, and this manual should be especially recommended to contractors who prepare publications for the agency. The most important thing, however, is to provide enough information to enable the reader to locate the source.

Appendices

Appendices are OPTIONAL. The appendix (one item) or appendices (more than one item), if needed, constitute the final section of a publication. The appendices are used to store background material of a legal, historical, or technical nature to which the reader may refer at leisure without interrupting the train of thought of the text itself. If appendices are part of a document, they are included in the table of contents and are designated in order with letters of the alphabet. These pages are also numbered consecutively after the body/text of the document. Refer to this document for examples.

SMALLER PUBLICATIONS FORMAT STYLE

The format for a smaller publication is allowed to vary in many ways.

Cover/Title Page

Smaller publications will usually have a combination cover/title page that shall include the following:

- The main title and subtitle, if any.
- The division responsible for the document.
- The name and title of the division administrator.
- The name and title of the chief author(s).
- The agency name.
- The name of the deputy/associate superintendent.
- The place of publication (Salt Lake City, Utah).
- The date of publication (month and year).

State Board Page

The State Board page shall be shown on the inside of the cover/title page.

First or Title Page

The first page shall include:

- The title of the publication.
- The date of the publication.
- The office and division responsible for the document, if not shown on the combination cover/title page.

SMALLER PUBLICATIONS WITHOUT A COVER/TITLE PAGE

In these publications, the text materials begin on the first page.

The FIRST PAGE shall show:

- The agency name. Example: Utah State Office of Education.
- The date of publication (month and year).
- The office and division responsible for the document.
- The author's name, if desired.
- The title and, if appropriate, the subtitle of the document.

The order of these items may be changed if desired.

SEQUENCE OF MATERIALS

The materials for larger publications shall be arranged, with certain exceptions, in the following order, even though one or more parts may be omitted. The same order would hold true, though with a greater number of omissions, for smaller publications.

Front Materials:	□ Cover
	☐ Letter of Transmittal
	□ Title Page
	☐ State Board Members Page
	□ Foreword
	□ Preface
	☐ Acknowledgments
	☐ Executive Summary
	☐ Table of Contents
	$\hfill\Box$ List of Tables/Charts/Graphs/Figures
Body:	☐ Introduction
	□ Body of Text
Reference Materials:	☐ Selected References or Bibliography
	☐ Appendix/Appendices
	☐ Index (if desired)

PROOFREADING/EDITING SKILLS

Taking Proofreading in Easy Doses

Use a ruler, a strip of colored paper, or other line guide to facilitate reading.

Sometimes proofreading in a pattern can be helpful:

- 1. Check punctuation marks to make certain they are where they belong for clarity.
- 2. Check for misspellings and typographical errors.
- 3. Check for errors in spacing and format.

Double-Checking Copy

Another person's errors are easier to locate than one's own errors. When material is extremely complicated or contains many figures or unusual names, two people should proofread together. One person should read aloud from the original copy as the other person makes corrections on the second copy. It is easier to read down a column of figures than it is to read across. Also, check to see that columns are correctly aligned horizontally and vertically.

Transpositions

A common error that is often overlooked is the transposition of figures, letters, and words. Figures and unusual words should be checked with extreme care. If a person does such checking without the aid of another person, he/she should check all items carefully and then check them again.

Proofreaders' Symbols

Each writer should check her/his work for content, organization, format, punctuation, spelling, capitalization, and correct word division. A proofreader should use proofreading symbols that are universal and consistent so that corrections are understood. Each typist, secretary, and office technician should take the responsibility for learning and using the proofreaders' marks found on pages 358 and 359 of *The Gregg Reference Manual, Tenth Edition*.

Examine the Manuscript

Examine the final copy of your document **BEFORE** it is submitted to the Quality Assurance Process. A visual check will catch errors in formatting, etc., that you can correct before having it proofed. This will help to expedite the proofing and printing process.

Further Information

The suggestions made in this chapter are brief. For a better understanding of what should be done, please refer to Section 12: Editing, Proofreading, and Filing (pages 348 to 359) in *The Gregg Reference Manual*, *Tenth Edition*, for detailed information.

Definition of Materials

"Materials" means writings, sound recordings, films, filmstrips, pictorial reproductions, drawings or other graphic reproductions, computer programs, and works of any other similar nature produced or specified to be delivered by agency employees, contractors, grantees, or other agents of the State Board of Education.

Using Copyrighted Materials

Fair Use. Copyright law provides for "fair use" of copyrighted materials without the express written permission of the copyright owner. Section 107 of Title 17 of the U.S. Code states that:

- ... the fair use of a copyrighted work, including such use by reproduction ... for purposes such as criticism, comment, news reporting, teaching (including multiple copies for classroom use), scholarship, or research is not an infringement of copyright. In determining whether the use made of a work in any particular case is a fair use, the factors to be considered shall include:
- (1) the purpose and character of the use, including whether such use is of a commercial nature or is for nonprofit educational purposes;
- (2) the nature of the copyrighted work;
- (3) the amount and substantiality of the portion used in relation to the copyrighted work as a whole; and
- (4) the effect of the use upon the potential market for or value of the copyrighted work.

Specific allowances and restrictions for various media and situations—library and classroom photocopying, musical performances and sheet music, videotapes, off-air taping, and software—are covered in detail by *The Copyright Primer for Librarians and Educators* (a joint publication of the American Library Association and the National Education Association).

While not clear to begin with, the status of the fair use provision in educational contexts has been further complicated by the 1991 *Basic Books, Inc. v. Kinko's* decision, in which a federal district court ruled against Kinko's for copying excerpts from books without getting permission from the publishers and selling the copies—in the form of course packets for students which Kinko's called "anthologies"—for a profit.

Obtaining Permission to Copy or Reprint

Materials published by the U.S. government are in the public domain and may be reproduced and distributed freely. If, however, you wish to use material from any other source as a reprint in any agency publication or for distribution in multiple copies at a conference or workshop, and no statement permitting such use appears in the material, you should seek the permission of the copyright owner (typically the publisher), even if you cannot find a copyright notice. Preferably, you will do this well in advance of any deadline. For assistance with requesting permission to use copyrighted material, contact the Government and

Legislative Relations Section.

The Copyright Primer for Librarians and Educators shows by way of a sample letter (on pages 54-55) how to obtain permission to use copyrighted material—such as a chapter, article, picture, or even a comic strip. Basically, you should send a courteous letter (enclosing a stamped, self-addressed envelope) to the publisher requesting permission to reproduce the material, and include the following seven elements of information suggested by the American Association of Publishers:

- 1. Title, author and/or editor, and edition of materials to be duplicated.
- 2. Exact material to be used, giving amount, page numbers, chapters, and, if possible, a photocopy of the material.
- 3. Number of copies to be made.
- 4. Use to be made of duplicated materials.
- 5. Form of distribution (classroom, newsletter, etc.).
- 6. Whether or not the material is to be sold.
- 7. Type of reprint (ditto, photography, offset, typeset).

OBTAINING A COPYRIGHT

General Principles

In most cases, materials developed by agency resources will be adequately disseminated by placing them in the public domain. However, there may be exceptional cases where limited copyright protection is needed as an incentive to promote effective dissemination of such materials or to protect the state investment in the development of materials. In no event will a copyright be granted to limit the free use and right to reproduce such materials by school districts, state agencies, or public institutions within the State of Utah. The Superintendent may request state copyright protection for a limited time, generally not to exceed a period of five years.

Copyright by School Districts and State Grant Recipients

Although the State Board allows a local school district to "copyright any original material that it develops with formula grant basis funds," the Board also "reserves the right to obtain copyrights for original materials developed on projects funded with discretionary grant basis funds which it controls or which it allots to others." This regulation covers all types of media. [See *Utah Administrative Code* R277–115.]

Copyright by State Employees

Certain USOE publications may be copyrighted by the agency if authorized by the State Superintendent. Private copyright of educational material developed by agency staff will be granted only if the material is clearly developed outside of regular duties and a letter of approval was granted by the State Superintendent prior to the initiation of the development project.

Copyright by Independent Contractors

While the agency, under the legal rule known as "work made for hire," owns the copyright to materials produced by USOE employees in the course of their regular duties, this rule does not necessarily include the work of independent contractors.

In its 1989 *Community for Creative Non-Violence v. Reid* decision, the U.S. Supreme Court upheld the common law distinction between employees and independent contractors and provided criteria for distinguishing the former from the latter and for determining those situations in which employees in fact function as independent contractors and may have a claim to copyright ownership.

To preserve for the state any benefits that may accrue to the investment of public funds in materials development and to protect the integrity of the materials by reserving the state's right to modify or prevent their modification, all contracts entered into by the agency for the production of copyrightable materials in any medium should explicitly grant the USOE ownership of the copyright, unless limited copyright ownership by the contractor would serve as an incentive to promote the dissemination of materials.

By "limited," the Board minimally means that when it "relinquishes its [copyright authority], it shall require a written agreement providing an irrevocable, nonexclusive, and royalty-free license to reproduce and publish the copyrighted materials ... [for use by] public institutions in Utah." [See *Utah Administrative Code* R277–115.]

The Board or agency may also require that the copyright revert to the public domain after a considerably shorter period of time than is allowed in federal law.

Copyright by Federal Government Grant Recipients

Regulations related to copyright may vary depending on the grant and the agency; consult the latest edition of the appropriate title in the annually revised Code of Federal Regulations (CFR) and subsequent issues of the daily Federal Register, which update the CFR. (Assistance in accessing these documents may be obtained from the Government and Legislative Relations Section.)

Projects approved and funded by the U.S. Department of Education (ED), for example, are governed by 34 CFR 74.145, which is cited here in part:

- (a) Works under grants. Unless otherwise provided by the terms of the grant, when copyrightable material is developed in the course of or under a grant, the grantee is free to copyright the material or permit others to do so.
- (b) ED rights. If any copyrightable material is developed ... ED shall have a royalty-free, nonexclusive, and irrevocable right to reproduce, publish, or otherwise use ... the work for Federal Government purposes.

Government policy has been that the results of activities supported by it should be used to best serve the public interest by making materials produced under project grants or contracts freely available to government, the education community, and the general public by placing materials in the public domain. Policy and guidelines may be adopted or applied by the State Superintendent of Public Instruction as is deemed appropriate when state-administered projects are funded in whole or in part by federal monies.

Registering a Copyright for USOE Publications

After obtaining approval from the State Superintendent, you should request the appropriate copyright registration form (forms differ by type of material—text, visual, music, etc.) by

writing to:

U.S. Register of Copyrights Library of Congress Washington, D.C. 20552

You will have to submit two copies of the material and pay a filing fee. If you do not want to register the material, you can still give notice of the agency's claim to copyright and, at the same time, assure educators and others of their right to fair use by including the following statement on the document's title page:

Copyright 1995 by the Utah State Office of Education. All rights reserved except those that may be granted under Sections 107 and 108 of the Copyright Revision Act of 1976.

Copyright by Employees, Contractors, or Grantees

Materials produced under agency grants and contracts must have approval for limited copyright protection granted to the contractor or grantee as a part of the written agreement between the parties. Approval for personal copyright protection must be obtained in writing. A request for authorization to copyright must include:

- 1. An identification of the project involved and a description of the type or class of material to be copyrighted.
- 2. An assessment of the market potential of the material and a rationale for why they should be disseminated through non-agency channels.
- 3. A statement of how statewide free use would be guaranteed.
- 4. A statement of the proposed duration of the requested limited copyright protection. (Only in very unusual circumstances would periods of time exceeding five years be granted.)
- 5. A statement of proposed or prospective producers, an indication of the size and nature of the estimated market, price to be charged, royalties, etc.
- 6. All requests for authorization to secure a limited copyright will be decided by the State Superintendent of Public Instruction. The employee, grantee, or contractor cannot proceed without written approval. Where the request is approved, the letter of approval will set forth the conditions under which authorization to secure a copyright is granted. Specific arrangements must be made regarding total, partial, or no remittance of royalties from the sale or rental of the copyrighted materials to the state.
- 7. In addition to any attribution clause that may be required by reason of the authorization, the following legend, with the appropriate date, will appear next to each copyright notice:

Copyright is claimed to $_$	(date).
Thereafter, all portions of	this work covered by this copyright will be in
the public domain.	

Approved projects that are funded in whole or in part by federal monies will conform to the United States Office of Education guidelines authorizing limited copyright protection. However, these guidelines and requirements for copyright approval will be interpreted to mean State Superintendent of Public Instruction rather than Commissioner of Education.

DISTRIBUTION POLICIES FOR PUBLICATIONS

Legal Authorization for Publications

Various statutory provisions of the Utah Code vest the Utah State Board of Education, the Utah State Office of Education, and the Utah State Office of Rehabilitation with the legal authority and responsibility for the preparation and distribution of education-related printed materials.

Publications Procedure

Upon completion of the printing, a final check of the completed document must be made by the originator before any distribution is to be made. Some distribution policies are determined by law and the originator of the publication should be familiar with any legal requirements. Distribution to school districts and schools becomes the responsibility of the appropriate division. Distribution is the responsibility of the originator.

The following procedures shall be followed:

- 1. A publication for general distribution throughout the state should be accompanied by an appropriate letter signed by the division administrator (and, if desired, by the program specialist). A copy of the letter and the publication should be transmitted to the State Superintendent and the appropriate associate superintendent prior to general distribution.
- 2. In some instances, the publication should be distributed to the members of the State Board of Education prior to any public release. The associate superintendent should be contacted for the proper protocol for each distribution.
- 3. Initial distribution shall be provided without charge to Utah public schools. A reasonable fee will be charged for publications delivered to individuals and non-state agencies or institutions. Charges, where appropriate, should include the cost of delivery.
- 4. Materials to be distributed in small numbers to workshop participants, selected teachers, or administrators may be provided without charge.
- 5. Single copies or limited quantities may be provided to private and parochial schools with the approval of the appropriate associate superintendent.
- Copies of each major publication will be sent to the Utah State Library Division for distribution to colleges, universities, and other organizations. The USOE Printing Supervisor handles this transaction.
- 7. Distribution to other departments in the colleges or universities will be at the discretion of the division.
- 8. Publications may be provided free on request to certain agencies outside of Utah on a reciprocal basis. The reciprocal program permits exchanging of published items with certain state and national agencies. (This practice should be carefully controlled to limit

undue publication and mailing costs.) Exchange on a reciprocal basis may be granted to:

- State education agencies.
- b. The United States Office of Education.
- c. Federally supported regional offices.
- d. Education-related agencies such as the Association of Secondary Principals, the Council of Chief State School Officers, the National Education Association, the National School Boards Association, etc.
- 9. Materials may be provided at an established price to all agencies and individuals not included in the free distribution categories. All orders must be accompanied by a check or money order payable to the Utah State Office of Education.

Items will not be sent on trial or prior to receipt of payment unless:

- a. The agency requesting the publication provides a purchase order number along with the request.
- b. The agency has an urgent need and costs are unknown, or the specialist has good reason for honoring the request anticipating subsequent payment.
- 10. Distribution of materials (the state directory, Core Curriculum, etc.) to salespersons and commercial firms shall be controlled by the section responsible for the publication or materials according to the rules established under the Government Records Access and Management Act (GRAMA). Numerically controlled receipts must be issued and the funds transmitted to the accounting section for deposit with the state treasurer according to the rules established in the Cash Management Act. Collection credits will be given to the appropriate division as allowed by the appropriations act. All other receipts will be deposited as revenue to the Uniform School Fund.
- 11. If the publication has been approved for copyright, two copies will be sent to the copyright office. It is the responsibility of the originator to initiate this mailing. A central record will be kept of copyrighted materials.
- 12. The distribution cost for a document will be established by the specialist and the director of the Printing Section at the time of publication. Special development cost, artwork, or color may require dramatic variations in price. This shall be transmitted in writing to the person responsible for the distribution of the publication.

Pricing and Selling Publications

A state agency cannot sell its publications for more than their actual cost, and, by policy, the USOE does not charge local education agencies for its publications. Otherwise, each section may establish the terms of availability for the publications it controls.

Storing, Disseminating, and Preserving Publications

The USOE does not offer a centralized service for storing and distributing its publications. While individual agency sections are responsible for developing and maintaining their own storage areas and dissemination networks, the USOE does utilize services provided by other state and federal agencies to ensure broad and continuing access to its publications.

All state agencies are required to provide copies of each publication that may be of interest to the general public, including material produced by contractors, to the Utah State Library Division for cataloging and distribution to designated depository libraries throughout the state. These depositories include the Utah State Archives, which by law must receive a copy of every state publication. The USOE Printing Supervisor serves as liaison to the Utah State Library and can assist in transmitting the requisite number of publications.

By policy, the USOE submits its publications to the ERIC Processing and Reference Facility (EPRF) for inclusion in a database of abstracts of educational literature and system of document dissemination and reproduction sponsored by the U.S. Department of Education. The ERIC database is widely available throughout the world. ERIC documents are available on microfiche at hundreds of libraries throughout the country (including all universities in Utah) and in print for a fee from the ERIC Document Reproduction Service (EDRS) at http://www.ericfacility.org.

OTHER PUBLISHING ISSUES

Electronic Publishing

The USOE has an electronic publishing system that utilizes the Internet. All USOE publications issued in print may be considered for reformatting and loading onto an appropriate USOE Internet server. Official electronic publications will be those that are maintained on such a server. This will be an archival source that anyone with Internet access can use at any time.

A USOE staff member who chooses to disseminate a document as an attachment to an electronic mail message or through the file transfer protocol is free to do so. If he/she also wants to invest that document with official status and ensure permanent public access to it, he/she may request that the document be put onto a USOE Internet server. At that point, the document becomes subject to the Quality Assurance Process and may eventually be officially issued as a USOE electronic publication, even though it may never appear in print.

Video Publishing

All agency videos, including those produced for the agency by contractors, are subject to the Quality Assurance Process. The process for videos has two phases:

- 1. The script is handled in the same way as any printed document. Once the script receives approval, the video may go into production.
- 2. After the video is completed, a team of at least three people is assembled to view the video. If possible, this team will include a representative of the target audience. If team members have any concerns about the quality of the video, they will provide written comments to the contractor, originator, and responsible section coordinator, who, in consultation with the Information Services Coordinator, will decide whether and to what extent the video should be modified.

Alternative Formats for People With Disabilities

State agencies are not required by law to make all of their publications available in all possible formats; however, all sections of the USOE and USOR should be prepared to respond to requests to accommodate people with disabilities. In most cases, this can be done simply by having a staff member read the publication aloud. In other cases, the State Office of Rehabilitation or the State Library may assist by converting the publication into Braille or recording it on audiotape.

Publication of a Thesis

No thesis or dissertation will be published for agency personnel, contracted employees, or graduate students unless the study was requested by the agency on a topic agreed upon by the agency and the institution of higher education. Following a discussion with the deputy superintendent, the administrator of the division requesting the thesis/dissertation will draft

a letter of explanation to be kept with the document. The letter will detail the purposes of the study, its value to the agency, its specific services, and the maximum costs to be incurred by the agency. The person writing the thesis/dissertation will countersign the statement agreeing to the conditions and the extent of participation by the agency. The request form and explanatory statement must be approved by the appropriate associate superintendent.

The Printing Section must have all materials in final form at least one month prior to due date. Exceptions must be approved by the administrator of the division. Overtime work imposed on Printing personnel as a result of late submission of the manuscript will be paid for by the originating section.

APPENDICES

MOST COMMONLY USED PROOFREADERS' SYMBOLS

SAMPLES OF BIBLIOGRAPHY ENTRIES

When writing bibliographic citations or referring to outside works, titles of longer works (such as books, magazines, newspapers, television series, and movies) should be italicized. Titles of shorter works (such as short stories, poems, articles within magazines or newspapers, individual episodes of TV shows, and chapters or parts of books) should appear in quotation marks.

For more detailed information, consult Chapter 15: Notes and Bibliographies (pp. 474–507) in *The Gregg Reference Manual, Tenth Edition*.

Book Title

Strunk, W., Jr., and E. B. White. The Elements of Style, 3rd ed. New York: Macmillan, 1979.

Journal or Magazine Article

Burke, N.D. "Restricting Gang Clothing in the Public Schools." *West's Education Law Quarterly*, Vol. 2, No. 3, pp. 391-404.

Newspaper Article

Crenshaw, Albert B. "Looking for a New Mortgage? Car? There's a Site for It." *The Washington Post*, November 2, 1998, p. 7, cols. 1-3.

Chapter in an Edited Book

Gurman, A.S., and D.P. Kniskern. "Family Therapy Outcome Research: Knowns and Unknowns." In A.S. Gurman and D.P. Kniskern (eds.), *Handbook of Family Therapy*. New York: Brunner/Mazel, 1981, pp. 742-775.

Unpublished Dissertation or Thesis

Devins, G.M. *Helplessness, Depression, and Mood in End-stage Renal Disease*. Doctoral dissertation, McGill University, 1981.

Article in a Reference Work

Cracraft, Joel. "Animal Systematics." McGraw-Hill Encyclopedia of Science and Technology, 8th ed., 1997.

Quotation From a CD-ROM

Guerilla Marketing: Winning Strategies for Greater Profits (CD-ROM). Houghton Mifflin Interactive, Boston, 1998.

Quotation From an Internet Source

Zelnick, Nate. "Wireless Net Access Gets Renewed Push." *Internet World*, November 16, 1998, http://www.iw.com/print/current/news/19981116-wireless.html (February 26, 1999).

Quotation From an E-Mail Source:

Goudy, Allie < Allie_Goudy@ccmail.wiu.edu>. "Continuing Education and Paraprofessionals." November 3, 1998, office communication (April 23, 1999).

Note: When citing e-mail or online material, include the date you accessed the material as well as the date the material was sent or posted on the Internet.

Appendix C HELPFUL HINTS

References to the Gregg manual refer to *The Gregg Reference Manual, Tenth Edition*. Look in the Gregg manual for more in-depth information on all of the following topics.

Capitalization:

In titles, capitalize verbs (even two-letter verbs such as "is" and "be") and all four-letter words such as "with." More information on capitalization in titles and headings can be found in the Gregg manual, Sections 360–362, pp. 116–117.

USOE staff members have decided to capitalize Core Curriculum and all related parts of the Core. Also capitalize Criterion-Referenced Tests (CRTs) and English as a Second Language (ESL). EDNET should be written with all capital letters.

For information about academic degrees, see Section 353, p. 113.

Punctuation:

- Use a **hyphen** after "self" when it serves as a prefix. Example: self-help. Information about using "self" is found in Section 836, p. 242 of the Gregg manual.
 - Use of a suspending hyphen is explained in Section 832, p. 240. (Example: long- and short-term securities.)
 - In many cases, whether or not a phrase needs to be hyphenated depends on its position in the sentence. For example, if a phrase such as "well known" follows a noun (as in "an actor who is well known"), it does not need a hyphen; but if the same phrase comes *before* the noun (as in "a well-known actor"), it must be hyphenated. See Section 831, pp. 237–240 of the Gregg manual for more information.
 - Information about using "school-age" and ages of people can be found in Section 433, p. 134 of the Gregg manual.
 - "Post-secondary education," "e-mail," "in-service," "CD-ROM," "at-risk students," and "role-play" should be hyphenated. More information on proper hyphenation can be found scattered throughout the Gregg manual (look in the index under "Hyphenation").
 - Words that should be "solid" (that is, written with no hyphens or spaces) include "nonprofit," "subtotal," "workplace," "online," and "database."
- The use of commas and other punctuation with expressions of dates is explained in Sections 154–155, page 37. (Examples: "The meeting was held Wednesday, May 3, 1995..." "Sales for February 1992 hit an all-time low.") Omit the commas around the year when it follows the month with no day.
- With **enumerated items** in a series, use a comma to separate each item and a comma before the last "and/or." See the Gregg manual Section 162, pp. 39–40.
- Information about **plurals and possessives** can be found in Sections 627–652 of the Gregg manual.

For example: "The ATC's policy is..." (possessive, requires an apostrophe) "The ATCs comprise a system of..." (plural, no apostrophe required) Remember that there are singular and plural possessives.

- "Its" is a possessive. "It's" is a contraction meaning "it is."
- With few exceptions, punctuation that accompanies quotation marks should go *inside* the quotation marks.

Formatting:

For correct outline format, see the Gregg manual, Sections 1718–1722.

In bulleted lists, the letter immediately following the bullet should be capitalized, and in most cases each bullet should end with a period (*not* a semicolon). See Sections 106–107 of the Gregg manual (Section 107b describes exceptions to this rule).

USOE Abbreviations:

ATC: Applied Technology College

AYP: Adequate Yearly Progress

CTE: Career and Technical Education (formerly Applied Technology Education [ATE])

NAAS: Northwest Association of Accredited Schools (This is the newest name for the organization formerly called the Northwest Association of Schools and Colleges [NASC], or the Northwest Association of Schools and of Colleges and Universities [NASCU].)

NCLB: No Child Left Behind

SEOP: Student Education Occupation Plan (no punctuation)